

Exhibit 300: Capital Asset Summary

Part I: Summary Information And Justification (All Capital Assets)

Section A: Overview & Summary Information

Date Investment First Submitted: 2010-03-19
Date of Last Change to Activities: 2012-08-24
Investment Auto Submission Date: 2012-02-28
Date of Last Investment Detail Update: 2012-02-28
Date of Last Exhibit 300A Update: 2012-07-30
Date of Last Revision: 2012-08-24

Agency: 016 - Social Security Administration **Bureau:** 00 - Agency-Wide Activity

Investment Part Code: 02

Investment Category: 00 - Agency Investments

1. Name of this Investment: Infrastructure - Office Automation

2. Unique Investment Identifier (Ull): 016-000002252

Section B: Investment Detail

- 1. Provide a brief summary of the investment, including a brief description of the related benefit to the mission delivery and management support areas, and the primary beneficiary(ies) of the investment. Include an explanation of any dependencies between this investment and other investments.**

The Social Security Administration's (SSA's) Office Automation (OA) investment provides the agency with the productivity software and the desktop, laptop and other computing equipment required to meet our growing workload demands. SSA's OA investment procures, manages and maintains the agency's computing resources beyond the National Computer Center (NCC) and Secondary Support Center (SSC). This investment provides current technology and software resources to support SSA's mission-critical programmatic and administrative work. The OA investment supports the SSA strategic goals to (1) improve the speed and quality of the disability process, (2) improve retiree and other core services and (3) preserve the public's trust in SSA's programs. As service demand increases, OA improves access to SSA's infrastructure and provides the desktop capability and capacity to increase the performance of internal systems. SSA continues to improve upon these services through initiatives such as large site server consolidation and virtualization. This reduces our operating costs and space requirements and makes SSA more energy efficient. SSA refreshes its computing infrastructure every four years to keep pace with technology upgrades. This also ensures maximum compatibility with new systems targeted for upgrade in the Agency's Strategic Plan, and provides for better system availability, changeability and stability. OA is one of three investments that together comprise SSA's Information Technology (IT) infrastructure. The Telecommunications, Data Center, and Office Automation

investments are interdependent, and together provide the central IT services that allow the agency to manage IT operations and workloads across all programs. OA is also closely related to SSA's National Support Center (NSC) investment that will migrate data center operations from the current National Computer Center (NCC) to the NSC from January 2015 to October 2016.

2. How does this investment close in part or in whole any identified performance gap in support of the mission delivery and management support areas? Include an assessment of the program impact if this investment isn't fully funded.

OA is central in the support of many SSA mission delivery and management functions. As identified in the SSA Agency Strategic Plan Fiscal Years (FY) 2008-2013, OA is aligned with the strategic goal to improve retiree and other core services by providing more efficient and effective processing capabilities, including improvements in the speed of processing Social Security Numbers (SSNs). SSA's workload in this area is expected to increase as the baby boomer generation begins to retire, and OA resources will be a key factor in meeting the increase in customer demand. OA also supports the SSA strategic goal to improve the speed and quality of the disability process. As with retirement claims, SSA expects the number of disability claims to increase as the baby boomer generation ages. OA will provide the additional hardware, software, and server speed and efficiency to process the increased workload. OA also supports SSA's goals to increase the use of green solutions in everyday operations. OA is reducing the agency's environmental footprint through large site virtualization, server consolidation, and elimination of obsolete technology. Fewer and smaller servers require less facility space, improve energy efficiency, and reduce overall annual operating costs. If not adequately funded, SSA's OA investment would not be able to provide sufficient computing resources to support agency programs, operations and initiatives. This would have a direct impact on the agency's ability to serve the public and to achieve its stated strategic goals.

3. Provide a list of this investment's accomplishments in the prior year (PY), including projects or useful components/project segments completed, new functionality added, or operational efficiency achieved.

In FY2011, SSA continued to upgrade and validate our current server technology through internet component, engineering and validation architecture. SSA implemented multi-lingual infrastructure for web applications to expand our communications capabilities. We also replaced an in-house developed validation tool with a commercial product to increase efficiency. OA continued to provide hardware maintenance renewals, ensuring the efficient and quick return to service for hardware within SSA. OA also provided ongoing software maintenance renewals.

4. Provide a list of planned accomplishments for current year (CY) and budget year (BY).

In FY2012, OA will continue to invest in the hardware and software maintenance renewals, as well as the internet component, software engineering and validation architecture to increase our overall efficiency. SSA will migrate mainframe software development and validation infrastructure to the latest WebSphere Application Server to provide simple, rapid code development and deployment, securable and scalable service oriented architecture run

time, extensible communication services, and effective application management. The OA investment will begin implementing large site virtualization to consolidate servers and allow easy adaptation and rollout of information. The first phase of the virtualization initiative will begin in SSA's Regional Offices with expansion to other offices. In FY2013, OA will again continue providing the hardware and software maintenance renewals within SSA, as well as the internet component, software engineering and validation architecture. SSA will implement the MySSA application infrastructure to provide secure access for individuals to their social security information. In FY2013 OA will also continue to provide software, while several software contracts will be going through renewal. SSA practices good stewardship by continually self-educating and negotiating with vendors for optimal results at minimal costs. In addition, OA will continue its support of hardware maintenance to expand workload capacity to meet SSA workload demands.

5. **Provide the date of the Charter establishing the required Integrated Program Team (IPT) for this investment. An IPT must always include, but is not limited to: a qualified fully-dedicated IT program manager, a contract specialist, an information technology specialist, a security specialist and a business process owner before OMB will approve this program investment budget. IT Program Manager, Business Process Owner and Contract Specialist must be Government Employees.**

2011-08-25

Section C: Summary of Funding (Budget Authority for Capital Assets)

1.

Table I.C.1 Summary of Funding

	PY-1 & Prior	PY 2011	CY 2012	BY 2013
Planning Costs:	\$0.0	\$0.0	\$0.0	\$0.0
DME (Excluding Planning) Costs:	\$57.1	\$11.9	\$25.7	\$26.1
DME (Including Planning) Govt. FTEs:	\$9.9	\$5.3	\$18.7	\$16.6
Sub-Total DME (Including Govt. FTE):	\$67.0	\$17.2	\$44.4	\$42.7
O & M Costs:	\$255.1	\$96.7	\$29.0	\$39.1
O & M Govt. FTEs:	\$49.6	\$43.2	\$21.1	\$24.8
Sub-Total O & M Costs (Including Govt. FTE):	\$304.7	\$139.9	\$50.1	\$63.9
Total Cost (Including Govt. FTE):	\$371.7	\$157.1	\$94.5	\$106.6
Total Govt. FTE costs:	\$59.5	\$48.5	\$39.8	\$41.4
# of FTE rep by costs:	505	393	316	316
Total change from prior year final President's Budget (\$)		\$50.8	\$-40.8	
Total change from prior year final President's Budget (%)		47.80%	-30.20%	

2. If the funding levels have changed from the FY 2012 President's Budget request for PY or CY, briefly explain those changes:

Office Automation increased in FY11 and decreased correspondingly in FY12 due to an accelerated desktop computer refresh and the buy down of contractor support services.

Section D: Acquisition/Contract Strategy (All Capital Assets)

Table I.D.1 Contracts and Acquisition Strategy

Contract Type	EVM Required	Contracting Agency ID	Procurement Instrument Identifier (PIID)	Indefinite Delivery Vehicle (IDV) Reference ID	IDV Agency ID	Solicitation ID	Ultimate Contract Value (\$M)	Type	PBSA ?	Effective Date	Actual or Expected End Date
Awarded	2800	SS001131101	NNG07DA35B	8000							
Awarded	2800	SS000740025									
Awarded	2800	SS000740029									
Awarded	2800	SS001050405									
Awarded	2800	SS001060108									
Awarded	2800	SS001150271									
Awarded	2800	SS001150282									
Awarded	2800	SS001150306									
Awarded	2800	SS000840039	GS35F4663G	4730							
Awarded	2800	SS001150309									
Awarded	2800	SS000940028	GS35F4076D	4730							
Awarded	2800	SS000940002	GS35F4027D	4730							
Awarded	2800	SS001131059	W91QUZ09A00 03	9700							
Awarded	2800	SS001060050									
Awarded	2800	SS001131176	W91QUZ09A00 03	9700							
Awarded	2800	SS001031050	GS35F0020M	4730							
Awarded	2800	SS001130944	GS35F0054M	4730							
Awarded	2800	SS000840020	GS35F4076D	2800							
Awarded	2800	SS001131181	GS35F0131R	4730							
Awarded	2800	SS001131118	GS35F4076D	4730							
Awarded	2800	SS000940002	GS35F4027D	2800							
Awarded	2800	SS001131010	NNG07DA20B	8000							
Awarded	2800	SS001131180	NNG07DA20B	8000							

Table I.D.1 Contracts and Acquisition Strategy

Contract Type	EVM Required	Contracting Agency ID	Procurement Instrument Identifier (PIID)	Indefinite Delivery Vehicle (IDV) Reference ID	IDV Agency ID	Solicitation ID	Ultimate Contract Value (\$M)	Type	PBSA ?	Effective Date	Actual or Expected End Date
Awarded	2800	SS001250037									
Awarded	2800	SS001131319	GS35F4076D	4730							
Awarded	2800	SS001131253	GS35F4076D	4730							
Awarded	2800	SS001131174	GS35F4794H	4730							
Awarded	2800	SS001131323	GS35F4794H	4730							
Awarded	2800	SS001131221	GS35F5192G	4730							
Awarded	2800	SS001131224	GS35F5086H	4730							
Awarded	2800	SS001131280	GS35F0066N	4730							
Awarded	2800	SS001040013	GS35F0789J	2800							
Awarded	2800	SS001150335									
Awarded	2800	SS001131229	NNG07DA35B	8000							
Awarded	2800	SS001131235	W91QUZ09A00 03	9700							
Awarded	2800	SS001150281									
Awarded	2800	SS001150373									
Awarded	2800	SS001131282	W91QUZ09A00 03	9700							
Awarded	2800	SS001131418	GS35F0461M	4730							
Awarded	2800	SS001131209	GS35F0367V	4730							
Awarded	2800	SS001230054	GS35F0716R	4730							
Awarded	2800	SS001230214	GS35F0047S	4730							
Awarded	2800	SS001230226	GS35F0611V	4730							
Awarded	2800	SS001230119	GS35F0559U	4730							
Awarded	2800	SS001230118	GS35F0858N	4730							
Awarded	2800	SS001230211	NNG07DA50B	8000							
Awarded	2800	SS001230152	GS35F0750P	4730							
Awarded	2800	SS001250069									

Table I.D.1 Contracts and Acquisition Strategy

Contract Type	EVM Required	Contracting Agency ID	Procurement Instrument Identifier (PIID)	Indefinite Delivery Vehicle (IDV) Reference ID	IDV Agency ID	Solicitation ID	Ultimate Contract Value (\$M)	Type	PBSA ?	Effective Date	Actual or Expected End Date
Awarded	2800	SS001250087									
Awarded	2800	SS000840011									
Awarded	2800	SS001230265	FA877107A030 7	9700							
Awarded	2800	SS001060099									
Awarded	2800	SS000940028									
Awarded	2800	SS001250104									
Awarded	2800	SS001230414	GS35F0161V	4730							
Awarded	2800	SS001230425	NNG07DA35B	8000							
Awarded	2800	SS000930796	NNG07DA46B	8000							
Awarded	2800	SS001250122									
Awarded	2800	SS001060053									
Awarded	2800	SS001250134									
Awarded	2800	SS001230336	GS35F0111K	4730							
Awarded	2800	SS001230550	GS35F0196M	4730							
Awarded	2800	SS001230503	GS35F4543G	4730							
Awarded	2800	SS001060082									
Awarded	2800	SS001230511	GS35F0300T	4730							
Awarded		SS001230518	GS35F4900H	4730							
Awarded	2800	SS001250173									
Awarded	2800	SS001230659	NNG07DA12B	8000							
Awarded	2800	SS001230537	NNG07DA32B	8000							
Awarded	2800	SS001230664	NNG07DA50B	8000							
Awarded	2800	SS001040014									
Awarded	2800	SS000760060									
Awarded	2800	SS001250154									
Awarded	2800	SS001060055									

Table I.D.1 Contracts and Acquisition Strategy

Contract Type	EVM Required	Contracting Agency ID	Procurement Instrument Identifier (PIID)	Indefinite Delivery Vehicle (IDV) Reference ID	IDV Agency ID	Solicitation ID	Ultimate Contract Value (\$M)	Type	PBSA ?	Effective Date	Actual or Expected End Date
Awarded	2800	SS001250188									
Awarded	2800	SS001230711	GS25F0010M	4730							
Awarded	2800	SS001250207									
Awarded	2800	SS001230705	W91QUZ09A0003	9700							
Awarded	2800	SS001230775	GS35F0119W	4730							
Awarded	2800	SS001230685	GS35F0170K	4730							
Awarded	2800	SS001230703	GS35F0553P	4730							
Awarded	2800	SS001230642	GS35F0054M	4730							
Awarded	2800	SS001230688	GS35F4076D	4730							
Awarded	2800	SS021235009	GS35F4543G	4730							
Awarded	2800	SS001060021									
Awarded	2800	SS001240013									

2. If earned value is not required or will not be a contract requirement for any of the contracts or task orders above, explain why:

SSA's Earned Value Management (EVM) policy and implementation was reviewed by OMB, OIG and others and deemed consistent with the intent of OMB's M-10-27 (and its predecessors) and the ANSI standards, which define a compliant EVM System. SSA performs the vast majority of our work in-house, and thus conducts EVM and program management at the total program level which includes both Government costs and support contracts. The inclusion of Earned Value in SSA contracts is based on the type of contract let, the services performed, and the date when the contract was let. When applicable per policy, Earned Value Management requirements are applied to SSA contractors in one of two ways. The first is to require the contractor to satisfy requirements in accordance with FAR 52.234. SSA currently has seven contracts that include a modified EVM FAR clause. The second is for the contractor to provide necessary data directly into SSA's in-house EVMS. SSA's in-house, program-level EVMS enables contractor efforts to be easily and separately monitored, yet produces data attributable to the component and sub-component level. Where appropriate, successor contracts to expiring SSA contracts include a modified EVM FAR clause suited to SSA's program level EVMS. Examples include the IT Support Services Contract (ITSSC) replacing the Agency Wide Support Services Contract (AWSSC), and the DCPS contract eventually replacing the Versa and Levy (Iron Data) contracts.

Exhibit 300B: Performance Measurement Report

Section A: General Information

Date of Last Change to Activities: 2012-08-24

Section B: Project Execution Data

Table II.B.1 Projects

Project ID	Project Name	Project Description	Project Start Date	Project Completion Date	Project Lifecycle Cost (\$M)
IOA04	FY11 Office Automation	FY11 Office Automation Planning.			
IOA0501	FY12 Office Automation Development, Modernization, and Enhancement	FY12 Office Automation Development, Modernization, and Enhancement.			
IOA0502	FY12 Office Automation Operations and Maintenance	FY12 Office Automation Operations and Maintenance.			
IOA0503	FY12 Office Automation Management Overhead	Management and overhead work years are based on the total number of FTEs and contractors allocated to this program for project-related work.			
IOA0504	FY12 Office Automation non-DCS Support	GS-2210 IT Specialists supporting major IT initiatives that work in various agency-level offices outside the Office of Systems.			

Activity Summary

Roll-up of Information Provided in Lowest Level Child Activities

Project ID	Name	Total Cost of Project Activities	End Point Schedule Variance	End Point Schedule Variance (%)	Cost Variance (\$M)	Cost Variance (%)	Total Planned Cost (\$M)	Count of Activities
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Activity Summary

Roll-up of Information Provided in Lowest Level Child Activities

Project ID	Name	Total Cost of Project Activities (\$M)	End Point Schedule Variance (in days)	End Point Schedule Variance (%)	Cost Variance (\$M)	Cost Variance (%)	Total Planned Cost (\$M)	Count of Activities
		(\$M)	(in days)					
IOA04	FY11 Office Automation							
IOA0501	FY12 Office Automation Development, Modernization, and Enhancement							
IOA0502	FY12 Office Automation Operations and Maintenance							
IOA0503	FY12 Office Automation Management Overhead							
IOA0504	FY12 Office Automation non-DCS Support							

Key Deliverables

Project Name	Activity Name	Description	Planned Completion Date	Projected Completion Date	Actual Completion Date	Duration (in days)	Schedule Variance (in days)	Schedule Variance (%)
IOA04	FY11 Office Automation	FY11 Planning.	2011-09-30	2011-09-30	2011-09-30	364	0	0.00%
IOA0502	FY12 Office Automation Operations and Maintenance - 1st and 2nd Qtrs	ITS Hardware and Software Maintenance Renewals; Government human resources to support ongoing maintenance of IT equipment.	2012-03-31	2012-03-31	2012-03-31	182	0	0.00%
IOA0501	FY12 IT Service Management	Upgrade to support the Change and Problem Reporting System to support	2012-05-31	2012-08-01		182	-92	-50.55%

Key Deliverables								
Project Name	Activity Name	Description	Planned Completion Date	Projected Completion Date	Actual Completion Date	Duration (in days)	Schedule Variance (in days)	Schedule Variance (%)
		many enhancements including 508 compliance.						
IOA0501	FY12 Center for Services Integration - Development - Phase 1	Enterprise Service Bus software support.	2012-05-31	2012-05-31	2012-05-31	182	0	0.00%
IOA0501	FY12 Enterprise Server Architecture	Growth of the Secure Wireless Email host architecture.	2012-07-31	2012-08-31		181	-31	-17.13%
IOA0501	FY12 LAN Moves, Adds, and Changes	Software and hardware to support new hires.	2012-08-31	2012-08-29		183	0	0.00%
IOA0502	FY12 Office Automation Operations and Maintenance - 3rd and 4th Qtrs	ITS Hardware and Software Maintenance Renewals; Government human resources to support ongoing maintenance of IT equipment.	2012-09-30	2012-09-30		182	0	0.00%
IOA0501	FY12 Infrastructure Support for Development and Validation	Install software and hardware to increase productivity; and increase storage and backup capacity to support demands on the multi-platform development and validation environments.	2012-09-30	2012-09-30		182	0	0.00%
IOA0501	FY12 Center for Services Integration - Development - Phase 2	Enterprise Service Bus software support.	2012-09-30	2012-09-30		121	0	0.00%

Section C: Operational Data

Table II.C.1 Performance Metrics

Metric Description	Unit of Measure	FEA Performance Measurement Category Mapping	Measurement Condition	Baseline	Target for PY	Actual for PY	Target for CY	Reporting Frequency
Availability of Online Applications	Percent	Technology - Reliability and Availability	Over target	99.600000	99.000000	99.900000	99.000000	Monthly
Availability of Internet Applications	Percent	Technology - Reliability and Availability	Over target	99.000000	99.000000	99.700000	99.000000	Monthly
Weekend Availability	Percent	Technology - Reliability and Availability	Over target	99.000000	99.000000	99.900000	99.000000	Monthly
Maintain the percent of people rating our services as "excellent," "very good," or "good"	Percent	Customer Results - Customer Benefit	Over target	78.200000	83.500000	81.400000	83.500000	Semi-Annual
Achieve the target percentage for correctly assigning original Social Security Numbers	Percent	Customer Results - Service Quality	Over target	100.000000	99.000000	99.900000	99.000000	Semi-Annual
Reduce the percentage of paper Forms W-2 completed	Percent	Technology - Efficiency	Under target	15.000000	15.500000	14.400000	14.000000	Semi-Annual
Percent of retirement, survivors, and Medicare claims completed up to the budgeted level	Percent	Mission and Business Results - Management of Government Resources	Over target	101.000000	100.000000	106.000000	100.000000	Semi-Annual